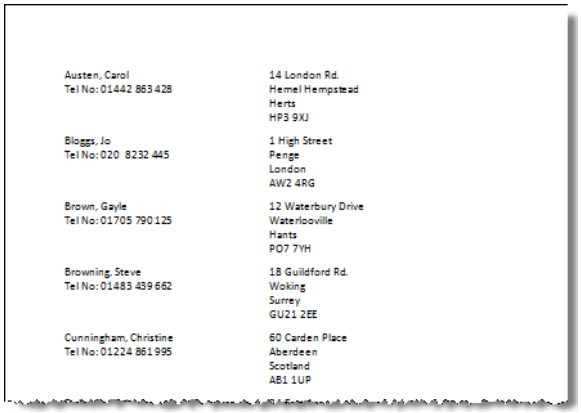
Word 2013 - Special Mail Merge Techniques & Troubleshooting

Creating a Directory

The main difference between a *Letter* mail merge and a *Directory* mail merge is that whereas a letter creates a new page for each record (row), the directory put all the record into just one single document. A Directory, therefore, is a way of re-arranging data that is in a strict column/row layout in the data source, into a more appealing and legible format.

	Title	FirstName	LastName	Address	Town	County	Postcode	HomePhone	Region
2	Miss	Carol	Austen	14 London Rd.	Hemel Hempstead	Herts	HP3 9XJ	01442 863 428	A
3	Mr	Jo	Bloggs	1 High Street	Penge	London	AW2 4RG	01122 232 445	A
4	Ms	Gayle	Brown	12 Waterbury Drive	Waterlooville	Hants	PO7 7YH	01705 790 125	A
5	Mr	Steve	Browning	18 Guildford Rd.	Woking	Surrey	GU21 2EE	01483 439 662	A
6	Mrs	Christine	Cunningham	60 Carden Place	Aberdeen	Scotland	AB1 1UP	01224 861 995	B
7	Mrs	Barbara	Delgado	24 East Ave.	Newton Abbot	Devon	TQ12 2LD	01626 842 168	A
8	Mr	Daniel	Duffy	2 Angelique St.	Weston Sup.Mare	Avon	BS23 1UJ	01934 865 912	B
9	Miss	Jacqueline	Douglas	36 Bergeline Ave.	Camberley	Surrey	GU15 3SY	01276 867 824	A
10	Ms	Alex	Francis	1 Demuth Way	Bracknell	Berks	RG12 1AX	01344 845 010	A
11	Mr	Will	Geraghty	455 Harwell St.	Didcot	Oxon	OX11 0QJ	01235 854 338	B
12	Mrs	Susan	Given	24 West Common	Harpenden	Herts	AL5 2JE	01582 560 521	B

Data source columns and rows



Same data re-arranged into a Directory

1. Create a new document.
2. Select the **Mailings** tab.
3. Click **Start Mail Merge** in the **Start Mail Merge** group

.
4. Select **Directory**.
5. Click **Select Recipients** in the **Start Mail Merge** group

.
6. At this point, you decide whether you want to type a new list, use an existing list or use data from your Outlook Contacts.

   For a detailed explanation on which option to choose, see our **Word 2013 – Introduction to Mail Merge** quick reference guide.

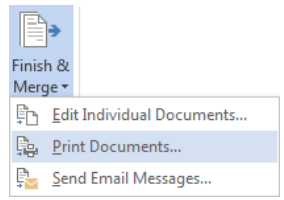
7. Insert the mail merge fields:
   a) Position the insertion point where you want the first merged data to appear. To make it easier to lay out and format the merge fields, the author of this document recommends that you add them into the cells of a Word table.
   b) In the **Mailings** tab, click **Insert Merge Field** in the **Write & Insert Fields** group.
   c) Select the field you wish to insert.
   d) Repeat steps 1 and 2 until all the merge fields have been inserted. The merge fields will be highlighted with a grey background but this will not print.

***NB**: Only add to the mail merge document text and formatting that you want repeated multiple times in the finished Directory document.*

8. Once you have inserted all the merge fields in the document, you may wish to see how it looks using the actual data.
   a) Select the **Mailings** tab.
   b) Click **Preview Results** in the **Preview Results** group.
   c) Make changes, if necessary, eg. move, delete or add merge fields.
   d) Although normally sufficient to view the first record in order to check for correct layout and structure, you can click the navigation buttons in the **Preview Results** group to go through each one separately.

***NB**: Editing any of the viewed records will result in **ALL** the documents inheriting the same changes. To customise documents individually, see the **Editing a Directory** later in this document.*

9. The last step of the mail merge is printing. Word will create a single document containing all the records (rows) in the data source. To restrict what is printed, see **Filtering and Sorting** later in this document.
   a) In the **Mailings** tab, click **Finish & Merge** in the **Finish** group.
   b) Select **Print Documents...**.



   c) Pick an option under **Print records**.
   d) Click **OK**.

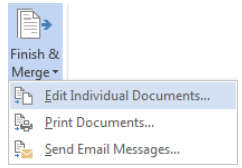
Editing a Directory

As explained previously, any changes made to the mail merge document will be inherited by the entire output.

If, therefore, you wish to add to the directory a title, headings or a cover page, you need to create a 'snap shot' (copy) of the mail merge as a separate document. This separate document will contain ALL the records that would have been printed but can now be edited. It is important to note that this document is NOT connected to the data source and as a result, will need to be re-created if the data source is changed.

Proceed as described previously under Creating a Directory but replace point 9 with the following:

1. In the **Mailings** tab, click **Finish & Merge** in the **Finish** group.
2. Select **Edit Individual Documents...**.



3. Pick an option under **Merge to New Document**.
4. Click **OK**.

   A new document is created and given a name (eg. **Directory1**). You can edit, print and save this document as a normal Word document. Remember, this document is a 'snap shot' of the merge and will not update if the data source changes.

Creating Mail Merge Emails

If you have a data source containing email addresses, Word can create a standard email message to each recipient. Word 'borrows' Outlook to send the emails and they are saved in the Outlook **Sent Items** folder.

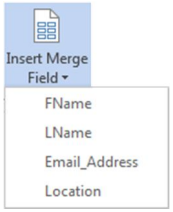
1. Create a new document.
2. Select the **Mailings** tab.

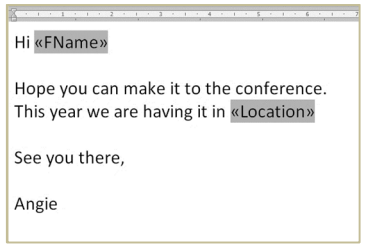
3. Click **Start Mail Merge** in the **Start Mail Merge** group

.
4. Select **E-mail Messages**.
5. Click **Select Recipients** in the **Start Mail Merge** group

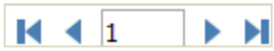
.
6. At this point, you decide whether you want to type a new list, use an existing list or use data from your Outlook Contacts.

   For a detailed explanation on which option to choose, see our **Word 2013 – Introduction to Mail Merge** quick reference guide.
7. Once the data source has been selected, you set up your main document by typing in any standard or "boilerplate" text and inserting the mail merge fields. To insert the mail merge fields:
   a) Position the insertion point where you want the first merged data to appear.
   b) In the **Mailings** tab, click **Insert Merge Field** in the **Write & Insert Fields** group.
   c) Select the field you wish to insert.
   d) Repeat steps 1 and 2 until all the merge fields have been inserted. The merge fields will be highlighted with a grey background but this will not print.

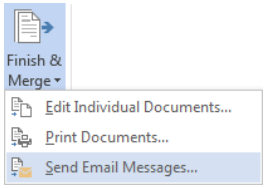


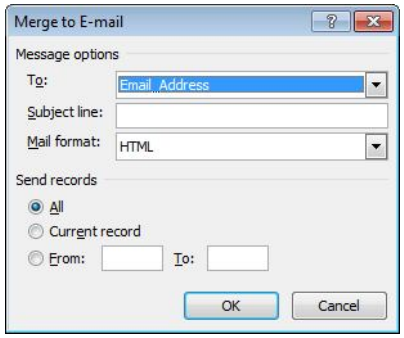


8. Once you have inserted all the merge fields in the email, you may wish to see how it looks using the actual data.
   a) Select the **Mailings** tab.
   b) Click **Preview Results** in the **Preview Results** group.
   c) Make changes, if necessary, eg. move, delete or add merge fields.
   d) Although normally sufficient to view the first email in order to check for correct layout and structure, you can click the navigation buttons in the **Preview Results** group to go through each one separately.



9. The final step is to send the emails.
   a) In the **Mailings** tab, click **Finish & Merge** in the **Finish** group.
   b) Select **Send E-mail Messages...**.





   c) Ensure the correct field containing the email addresses is selected in the **To:** box.
   d) Enter a **Subject line:**.
   e) Pick an option under **Send records**.
   f) Click **OK**.

   The emails will be transferred to your **Outlook Outbox**. This is so that if desired, you can open each one individually to personalise it. In Outlook, you may need to execute a **Send & Receive** command to actually send the emails.

Filtering and Sorting

Sometimes, you may not want to include all the records in a data source in your mail merge or, you may wish to print them in a certain order.

1. Select the **Mailings** tab.
2. Click **Edit Recipient List** in the **Start Mail Merge** group

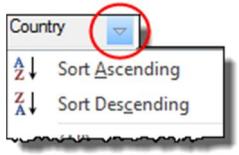
and do one of the following:

To omit individual records from the mail merge:

Untick the check box to the left of the record.

To sort the mail merge:

   a) Click the down arrow next to the relevant field.
   b) Select **Sort Ascending** or **Sort Descending**.

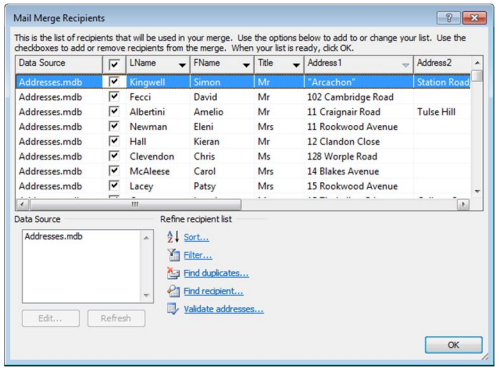


To filter the mail merge:

   a) Click the down arrow next to the relevant field.
   b) Select an item in the list.

*Tip: To avoid printing out letters that have incomplete addresses, select **Non Blanks** from the address columns.*

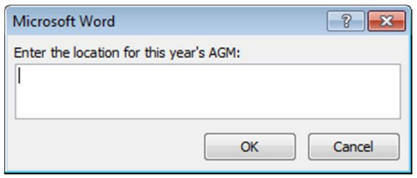
At the bottom of the Mail Merge Recipients dialog box under **Refine recipients list**, there are links to commands for carrying out more advanced sorts and filters.



Special Fields

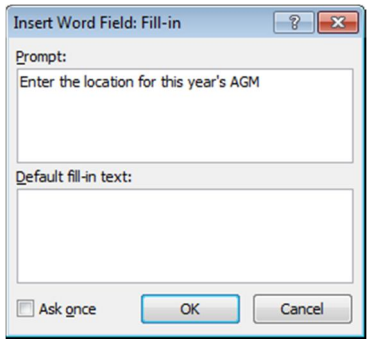
The Fill-In field

The Fill-In field is used where you want Word to prompt you by means of a simple dialog box for a piece of changing information each time data records are merged. For example, you may have a mail merge document that you use each year to invite guests to the company AGM. Every year the AGM will probably be at a different location and at a different date and time. So that you don't forget to change these details each year, you can add Fill-In fields to prompt you for the current details.



1. Position the cursor in the mail merge document where you want the first piece of changing data; do not type anything!
2. Select the **Mailings** tab.
3. Click **Rules** in the **Write & Insert Fields** group.

4. Select **Fill-In...**.



5. Type a **Prompt**. This is the message that that the dialog box will display.
6. If desired, enter **Default fill-in text:**. If for example, your AGM is usually at the same location, you can enter it here otherwise, just leave it blank.
7. Ensure you tick the **Ask once** check box. If you fail to do this, the Fill-In field prompt will appear for every record in your data source. If your data source has hundreds of records you will have to click it hundreds of times!
8. Click **OK**.
9. Do not enter anything into the following dialog box; just click **OK**.

   You will not see anything in the document but if you press **[Alt]+F9** the '*Field Code*' (instructions to Word on how to use the Fill-In field) will appear, eg.

   { FILLIN "Enter the location for this year's AGM:" }
10. Press **[Alt]+F9** again to hide the field code.
11. Repeat steps 1 to 9 above for any further Fill-In fields that you want to add. Use **[Alt]+F9** each time to check it has been entered correctly.

Each time you then use the **Finish & Merge** command to print, edit or email the document, the Fill-In field prompt will appear requiring an input.

***Tip**: To prompt for a single piece of information that you want to use in several different locations of the document, use the **Ask** field. For an explanation of the Ask field, refer to Microsoft Word Help.*

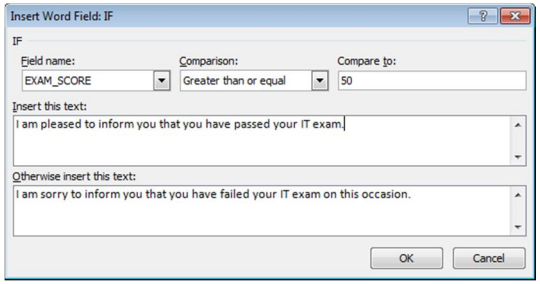
The IF – THEN – ELSE field

This special field is able to make a decision based on a condition in the source data and enter into the mail merge document one piece of text if the condition is true and another piece of information if the condition is false.

For example, you have a data source containing students' exam results. You want to mail merge letters to the students advising them if they have passed or failed. The condition for a pass is an exam score of over 50. You can use an If-Then-Else field in your document to test each student's score and if it is 50 or more, write Pass in the letter and if it is not, write Fail.

1. Position the cursor in the mail merge document where you want the If-Then-Else field to automatically enter the text; do not type anything!
2. Select the **Mailings** tab.
3. Click **Rules** in the **Write & Insert Fields** group.

4. Select **If... Then... Else**.
5. In the **Field name:** box, select the field that needs to be tested for a true/false (yes/no) condition.
6. In the **Comparison:** box enter the criteria.
7. In the **Compare to:** box, enter the value that field needs to be compared to. In the screenshot below, the exam score field is being tested to see if it's more than or the same as 50.



8. Click in the **Insert this text:** box.
9. Type what you want Word to write in the document if the test created above is true.
10. Click in the **Otherwise insert this text:** box.
11. Type what you want Word to write in the document if the test created above is false.
12. Click **OK**.
13. Preview the results and use the navigation buttons to move through each record. If the **If... Then... Else** field has been set up correctly, you will see different text displayed based on the IF condition.

To edit the field, display the field codes (**[Alt]+F9).** An example of what the field code should look like is given below:

{ IF { MERGEFIELD EXAM_SCORE } >= 50 "I am pleased to inform you that you have passed your IT exam." " I am sorry to inform you that you have failed your IT exam on this occasion." }

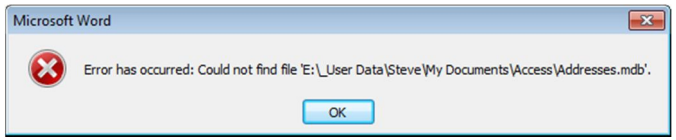
Press **[Alt]+F9** when finished to hide the field codes.

If you are unsure how to edit the field code manually, delete it completely and use the method given above to re-insert it.

Troubleshooting Mail Merge Documents

Lost data source

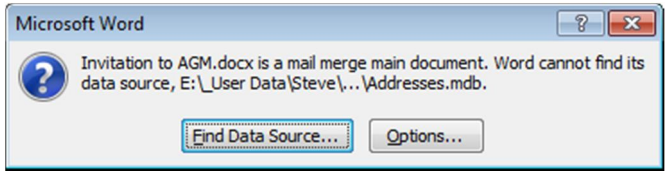
If upon opening a mail merge document and clicking **Yes** to the security warning message, you receive the following:



...it is because the data source has been moved, renamed or deleted.

Unfortunately, Word makes rather a meal of this and presents you with several consecutive (and confusing) dialog boxes.

The author of this document recommends that you keep clicking the **Close** button to all these dialog boxes until you get to the following one.


Microsoft Word
Invitation to AGM.docx is a mail merge main document. Word cannot find its data source, E:_User Data\Steve\...\Addresses.mdb.
Find Data Source...
Options...

If you know where the data file has been moved to and/or what it's been renamed to:

1. Click **Find Data Source...**.
2. Navigate to the new location and/or name of the data source file.
3. Click **Open**.
4. If required, repeat Step 2 (*Use an existing list*) above.

If you do not know what's happened to the data source or it has been deleted:

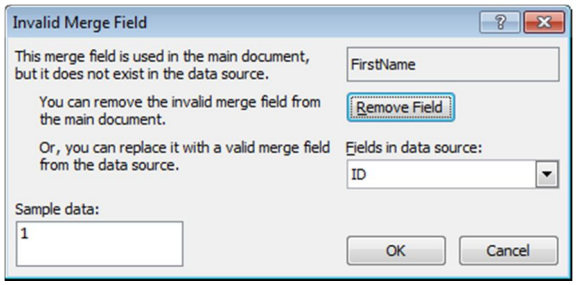
1. Click **Options...**.

Microsoft Word
If the mail merge data/header source Addresses.mdb no longer exists, choose Remove Data/Header Source to remove its association with Invitation to AGM.docx or choose Remove All Merge Info to make Invitation to AGM.docx a normal Word document.
Remove Data/Header Source
Remove All Merge Info

2. Click one of the described options (recommend **Remove all Merge Info**). The document will open.
3. Delete any merge fields. Press **[Alt[+F9** to show the field codes and identify them more easily. { MERGEFIELD Country }. There may be other field codes in your document (eg. index entries, cross-references, footnotes) so ensure you only delete the MERGEFIELD ones.
4. Press **[Alt[+F9** to hide the field codes.
5. Reconnect the document to a new data source by repeating Step 2 above.
6. Re-insert the new merge files as described in Step 3 above.
7. Preview and finish as described in Steps 4 & 5 above.
8. Save the document.

Lost merge fields

If you successfully open a mail merge document but get the following message when you try to preview or print the document, it means that you have a merge field in your document that does not have a match in the data source. Chances are that someone has renamed one or more of the headings n the data source table.


Invalid Merge Field
This merge field is used in the main document, but it does not exist in the data source.
FirstName
You can remove the invalid merge field from the main document.
Remove Field
Or, you can replace it with a valid merge field from the data source.
Fields in data source:
ID
Sample data:
1
OK
Cancel

You will also see the following error for the unrecognised merge field.

Error! MergeField was not found in header record of data source.

Solutions are:

1. Use the dialog box shown above to remove the unrecognised merge field.
2. Use the dialog above to re-match the unrecognised merge field.
3. Cancel the above message and manually delete the unrecognised merge field.
4. Follow Step 3 above to re-insert the correct (renamed) merge field.

Date & Number Formatting Issues

If your data source contains dates, you will find that in the mail merge document they will appear in US date format (month/day/year) even if they are UK dates in the data source.

Similarly, numbers that look perfectly formatted in the data source may not appear the same in the mail merge document.

These issues can be solved as follows:

For date fields:

1. Press **[Alt[+F9** to show the field codes.
2. In the merge field, type the following text AFTER the field name- **\@"dd/MM/yy"**. Ensure the **M**s are UPPER CASE.

   If, for example, the date field is called **MeetingDate**, then the edited field code will read:

{ MERGEFIELD MeetingDate \@"dd/MM/yy"}

3. Press **[Alt[+F9** to hide the field codes.

   Select the field and press F9 (without the **[Alt]** key) to 'refresh' the field.

   You can modify the date formatting by varying the numbers of d's, M's, and y's used. For example, the field code...

{ MERGEFIELD MeetingDate\@"d MMMM yyyy"}

... will display dates as...

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For currency fields:

1. Press **[Alt[+F9** to show the field codes.
2. In the merge field, type the following text AFTER the field name- **\#"£#,##0.00"**. This will give a sterling symbol, a comma separator for the thousands and two decimal places.

   If, for example, the date field is called **ProductCost**, then the edited field code will read:

{ MERGEFIELD ProductCost \#"£#,##0.00"}

***Tip**: for USA (dollar) style, replace the £ symbol with a $ symbol.*

For number (non currency) fields:

In the merge field, type the following text AFTER the field name- **\#"#,##0.00"**. This will give a style with a comma separator for the thousands and two decimal places.

If, for example, the date field is called **Quantity**, then the edited field code will read:

{ MERGEFIELD Quantity \#"#,##0.00"}

***NB**: If you want a currency or number style that does not display decimals, omit the **.00** from the examples above.*